

# Program Design & Customer Experience – Identify Partners

## Description

Before moving forward with program design and implementation, identify and develop relationships with partners who can help you reach your customers and whose experience and expertise can make your program as successful as possible.

These partners are companies, organizations, or people who participate in the delivery of program products and services, such as marketing, energy assessments, financing, rebates and other incentives, home energy upgrades, contractor training, and quality assurance. They provide unique value to a program and are often locally based.

### What do we mean by “partners”?

Within the context of the Better Buildings Residential Program Solution Center,

**Partners** are organizations that play a direct role in program delivery. Examples include contractors affiliated with the program, community groups involved in marketing and outreach, and financial institutions providing residential energy efficiency loans to your customers.

They are distinct from:

- **Stakeholders**, which have an interest in what the program does but do not play a direct role in program delivery, such as local political leaders, environmental or housing advocacy groups, and residential energy efficiency equipment providers.
- **Program implementers**, which are non-profit or for-profit organizations or individuals whose services can be obtained through a competitive procurement process to run all or part of a program.

### Program Design & Customer Experience

#### Stages:

##### Overview

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. **Identify Partners**
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

Among other things, partners can help your program:

- Provide customers with additional services and value
- Leverage existing resources and knowledge, so that you don't need to develop them on your own
- Reach new customers or contractors through partner networks and relationships
- Understand the market and needs of customers and contractors
- Craft more effective messages and outreach strategies.

Partnerships, when thoughtfully conceived, allow a program to ramp up more quickly to achieve its goals, while expending fewer resources than a program that operated independently. They can also turn potential conflict and competition into mutual support. In this handbook, you will learn about identifying program partners, recruiting them, establishing appropriate organizational arrangements, and setting up mechanisms for ongoing communications and coordination.

Before reaching out to potential partners, you need to understand the activities involved in delivering your program. You should understand where your organization is particularly strong or weak and where a partner's skills, resources, and/or relationships could strengthen your

efforts. You may want to further assess your partnership needs once you've made additional [program design decisions](#).

Once your program and a potential partner understand your shared needs and goals, the relationship must be clearly defined for all involved. Establishing a formal agreement or informal ground rules can help you ensure effective communication, agree on a shared vision for success, identify shared goals, and develop a clear timetable. Decisions you make at this stage about the roles and responsibilities of partners and your relationship to them will influence your [program design](#) and your [implementation plans](#).

Key steps for identifying partners are:

- Identify areas where your program would benefit from added strength
- Identify potential partners that can strengthen your program
- Recruit partners by understanding their goals and motivations
- Establish ongoing coordination and communication with partners

Find related information across other program components:

- **[Market Position & Business Model – Identify Partners](#)**  
*Identify and engage organizational partners in your business model design.*
- **[Marketing & Outreach – Identify Partners](#)**  
*Establish relationships with organizations that will assist with program marketing and outreach.*
- **[Financing – Identify Partners](#)**  
*Identify and partner with financial institutions that can provide capital, underwriting, and other functions to enable your customers to access financing.*
- **[Contractor Engagement & Workforce Development – Identify Partners](#)**  
*Establish relationships with contractors who will deliver program products and services, and with organizations that train and certify workers.*

## Step-by-Step

Partnerships can broaden your residential energy efficiency program's reach, add relevant skills and expertise to your efforts, and enhance the credibility of your program. For effective partnerships, you will want to take the following steps.

### Identify areas where your program would benefit from added strength

The [market assessment](#) for your program should have identified what kinds of products and services are needed in your market, and you should already have a good understanding of your [organization's strengths and capabilities](#). Now is the time to reflect on this information and identify areas where partners with the right expertise could enhance your organization's ability to deliver your proposed program.

Partnerships are most useful when partners have strengths that complement your weaknesses. Examples include:

- Community organizations that are familiar with neighborhoods and homeowners and that can help build community trust in your program if your organization is not well known in the area
- Local workforce training organizations that can help build the skills of contractors in your area and encourage them to sign on as participating contractors with your program
- Financial institutions whose missions include local economic development, and have capital to lend for low-interest financing for your customers.

## Identify potential partners that can strengthen your program

Successful partnerships are formed when both parties can accomplish more of what matters to them through partnership than they can on their own. For example, a workforce training organization with a mission to create jobs may benefit from partnering with your program to provide contractor sales training. If your program creates more demand for home energy upgrades, then there is more demand for qualified contractors, potentially more employment opportunities, and overall more success for both organizations.

Partnerships do not necessarily require that partners have the same values or goals, but the goals do need to be complementary. Partnerships should be based on shared interests and trust. Most partners will want the opportunity to share success and credit for partnership activities.

With this in mind, you can begin to identify the right partners. Doing this requires understanding what matters to potential partners, which is best done by talking to them—and especially listening to them. It is not enough for you to think about what a partner might gain from working with your program. You must understand what the partner needs and ensure that the partnership will be able to provide it. Failing to do this will almost guarantee that partners will become disgruntled, which puts your program's success at risk.

As you identify partners, remember that partnerships don't need to last forever. They only need to last as long as the relationship creates mutual value. It takes resources and effort to maintain partnerships, and programs need to be ready to end or change partnerships as circumstances evolve.

### Contractor Partners

Partnering with local contractors enables you to offer residential energy efficiency services and typically helps boost participation in residential energy efficiency programs. Leveraging contractors' existing relationships is a cost-effective way to deliver program messages. Contractors interact most closely with your customers and are likely to become the program's primary sales force for home energy upgrades?as long as the program is designed to be something contractors want to sell. A key step for effective contractor engagement, according to many successful programs, is to get them involved early in the program design process. You should look in your area for a local home performance guild or an [Efficiency First](#) chapter. More information on contractor and workforce partners can be found in the [Contractor Engagement & Workforce Development Identify Partners handbook](#).

### Other Program Delivery Partners

When searching for partners, look for public, private, and nonprofit organizations with a history of collaboration and community involvement that are likely to be trusted by your program's customers and other partners.

The best partners will have:

- Complementary missions, goals, or interests
- An appreciation of the value of your program
- Well-established communication mechanisms
- Internal champions for your program with the authority to commit their institutions, fulfill obligations, and promote your program goals within their organizations.

Partners can include utilities, state energy offices, community groups, neighborhood associations, faith-based organizations, community and public health partners, nonprofit organizations, weatherization assistance programs, workforce training programs, trade or professional associations, real estate organizations, foundations, financial institutions, universities, and other institutions. They can also include for-profit businesses when complementary goals can be identified. More information about marketing partners is available in the [Marketing and Outreach](#) component of the Solution Center. More information on financial partners is available in the [Financing](#) component.

In addition to the organizations above, consider partnering with ENERGY STAR by becoming a [Home Performance with ENERGY STAR](#) sponsor. This partnership will give you an opportunity to associate with a trusted, national brand and gain access to technical and marketing tools.

#### [Enhabit Makes Program Work for Contractors](#)

From the outset, leaders at [Enhabit](#) knew that actively engaging contractors would be critical to the program's success. To do so, Enhabit organized morning meetings every two weeks with a rotating group of contractors. Other program partners involved in workforce issues also attended—such as the state's administrator of utility ratepayer funds for efficiency, Energy Trust of Oregon, and the program's quality assurance firm. Their attendance allowed all of these partners to work out emerging issues or concerns during the meetings.

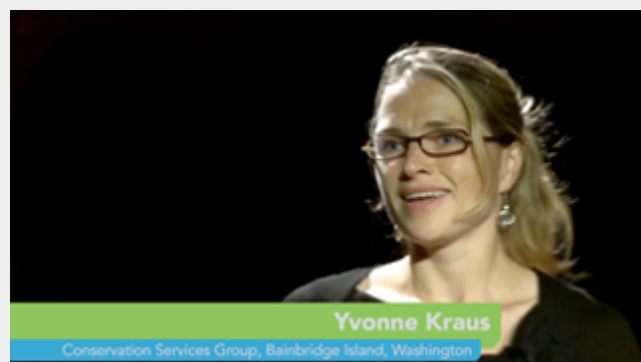
Through these meetings, Enhabit helped to foster the development of a structured and more organized contractor network, known as the [Home Performance Contractors Guild of Oregon](#). Enhabit regularly engaged the Guild to understand contractors' views early in decision-making processes and to avoid creating problems in the upgrade process. By rewarding the program's top contractors and helping new companies enter the home performance industry, Enhabit also incentivized high-quality work and helped to cultivate a burgeoning workforce.

Source: [Spotlight on Portland, Oregon: Making the Program Work for Contractors](#), U.S. Department of Energy, 2011.

There are many examples of successful partnerships that have been developed to promote home energy upgrades:

- [Efficiency Maine](#) worked with Coastal Enterprises, Inc., a nonprofit community development organization, to offer a [training course](#) in sales and another on communication and interpersonal skills to contractors in the state.
- In Philadelphia, [EnergyWorks](#) partnered with local and national financing partners to promote and provide both home energy upgrades and financial products to residents and businesses. These partners were:
  - The [Philadelphia Industrial Development Corporation](#), a non-profit joint venture between the City of Philadelphia and the Greater Philadelphia Chamber of Commerce that helps fund commercial energy improvements.
  - The [Reinvestment Fund](#), a national community development organization that also supports Philadelphia businesses in making upgrades.
- [EnergyWorks](#) also established a partnership with its local gas utility, Philadelphia Gas Works (PGW), to share lessons learned and, with the proper customer authorization, customer energy usage data. This partnership helped PGW enhance its own residential energy efficiency programs by applying the knowledge learned about home energy upgrades from EnergyWorks. The partnership also provided PGW customers with access to EnergyWorks' loan program. For EnergyWorks, the partnership gave it access to PGW customers for marketing. Learn more about the partnership from the case study "[In the City of Brotherly Love, Sharing Know-How Leads to Sustainability](#)"
- [The Greater Cincinnati Energy Alliance \(GCEA\)](#) partnered with [AFC First](#), a financial institution focused on energy efficiency financing, to provide financing to local residents for home energy upgrades. AFC First also provided all the tools and training that contractors needed to promote financing options to homeowners, which helped GCEA save resources on two critical program components.
- [JEA](#), a nonprofit, community-owned utility in Jacksonville, Florida, partnered with a local trade group, the Northeast Florida Builders Association, to create [E-Council](#), a center for building science education that trains home performance professionals.
- [Seattle's Community Power Works](#) (CPW) [worked with several partners](#) in the city to design and implement its program. Among these was Seattle's Office of Economic Development (OED), which had run healthy food programs in CPW's target neighborhoods. Seeking to draw on OED's connections with the Seattle business community, CPW approached OED staff members to learn from their experiences with community outreach and their relationships with local organizations. CPW also tapped Seattle's Office of Housing for insight into effective technical, marketing, and communication approaches based on its experience administering Seattle's low-income weatherization program.

#### [In Their Own Words: Partnership Can Benefit Energy Efficiency Programs and Utilities](#)



Source: U.S. Department of Energy, 2012.

## Recruit partners by understanding their goals and motivations

When recruiting potential partners, approach them with an interest in learning about who they are, both as people and as organizations, rather than trying to convince them to join your effort. Take the time to listen and understand what matters to them, and talk with them honestly about what you are trying to do. If you believe that they will add strength to your program, and if you believe that partnering with you can help them accomplish their goals, then convince them of the value of your program by framing the relationship in terms of the value to them, rather than on what your program will gain from them. Understanding your potential partner's [business model](#) and goals will help you identify and communicate the benefits of entering into a mutually beneficial relationship.

Read [It's Academic: BetterBuildings for Michigan Partners with University to Reach Employees](#) to learn how the Michigan Saves (formerly BetterBuildings for Michigan) partnership with Grand Valley State University helped to promote energy assessments and upgrades to the university's employees and resulted in strong rates of participation.

To develop and maintain lasting, productive partnerships, establish expectations and partnership terms early in the relationship. Where a formal understanding is necessary, you can establish a partnership agreement or a memorandum of understanding that defines the roles and expectations for each partner.

A partnership agreement does not need to be a formal legal document in order to serve as a guide that outlines what each partner will provide, including at least:

- Each partner's roles and responsibilities
- The approval process for any joint materials
- The terms, scope, and duration of the partnership.

The U.S. Department of Energy's Better Buildings Neighborhood Program's "Creating a Partnership Agreement" [worksheet](#) can be used as a template. Where partnerships include one organization making payments for services to another, you may want to consider legal contracts.

### Understanding the Motivations of Your Partners

It is important to understand not only your partners' goals, but also the motivation behind those goals and some of the challenges your partners face in achieving them. For example, one city-run residential energy efficiency program with education, outreach, and workforce goals partnered with its local utility to deliver its program, believing that it was in the best interests of both programs to increase participation in the local utility program. While both organizations took part in a steering committee with other stakeholders, the program was continually frustrated by the lack of engagement from the local utility.

After sitting down with some of the utility representatives to discuss the challenges they were having, the program realized that the state public utility commission rules significantly discounted the savings that the utility program was able to claim against its regulatory targets, as a result of the collaboration with the program. This provided a significant disincentive for the utility to actively engage in the partnership. With a better understanding of challenges faced by the utility, the program was able to work with the utility and the public utility commission to ensure that the commission attributed all savings from the partnership to the local utility.

## Establish ongoing coordination and communication with partners

Ongoing communication with program partners can help you maintain agreement as the program evolves from initial design to launch to ongoing implementation. Consider setting up forums for regular communication, such as a steering committee or working group that meets weekly, monthly, or quarterly based on the needs of your program.

Partner forums provide opportunities to share valuable insights about what your program team and your partners are hearing, seeing, and experiencing. For example, a forum with contractors and other partners in direct contact with customers can provide information about what they are learning about customer behavior, motivations, and drivers. This information can help you make decisions about product offerings, incentives, messaging, and how your program can best work with contractors to deliver assessment and upgrade services to customers.

As your program is designed, launched, and implemented, you should periodically evaluate how your partnerships are working, if they are sufficient, and whether relationships, roles, or responsibilities should be revised.

Early in the process of running your program, you will find that it is important to ensure a common base of understanding and consistency of messaging across all partners. Many programs have found that education and communications training across partners is valuable early on.

- For example, Better Buildings for Michigan initiated a series of door-to-door “sweeps” to market the program and—through their real-time effort to learn and refine their efforts—realized that they needed more consistency in messaging to homeowners. The program ran a sales training program with all of its outreach partner organizations to help deliver a compelling and effective message to homeowners. For more on Better Buildings for Michigan’s “sweeps,” see the case study [“Spotlight on Michigan: Sweeping the State for Ultimate Success”](#)

#### Connecting with Partners: Program Examples

##### Milwaukee and Madison, Wisconsin

In an effort to better identify various customer and market barriers, [Wisconsin Energy Efficiency \(WE2\)](#) formed partnerships with teams from the Wisconsin Energy Conservation Corporation; the cities of Milwaukee and Madison; and their financial partner, Summit Credit Union. Marketing teams from each program met to develop an approach for reaching WE2’s target audiences using the partners’ local knowledge of their residents and businesses.

##### Austin, Texas

Once its draft promotional plans were in place for its “Best Offer Ever” program, [Austin Energy](#) hosted a breakfast meeting—getting on its energy professionals’ schedules before they were out in the field for the day—to discuss plans over a breakfast of tacos and coffee. Contractors provided feedback on the launch plans, received sample forms, and were trained on how to use them. The contractors were also candid about their concerns in implementing the offer. Most contractors had not actively marketed financing options before, so Austin Energy walked the group through each party’s role and responsibility in the loan process. To find out more about how Austin Energy partnered with contractors, see the case study [Spotlight on Austin, Texas: Let Your Contractor Be Your Guide for Big Rewards](#)

##### West Rutland, Vermont

The [NeighborWorks H.E.A.T. Squad](#) in West Rutland, Vermont, held regular in-person meetings with its participating contractors—usually over breakfast—to gain valuable insights from recent contractor experiences and understand what resonates with customers.

##### Denver and Boulder County, Colorado

The [Energy Smart](#) program in Denver and Boulder County, Colorado, hosted a smart energy kickball league with program staff and contractors. Engaging with partners after hours in a casual social setting helped build trust and camaraderie.



## Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

### Develop partnerships based on an alignment of goals, strong collaboration, and consistent communication

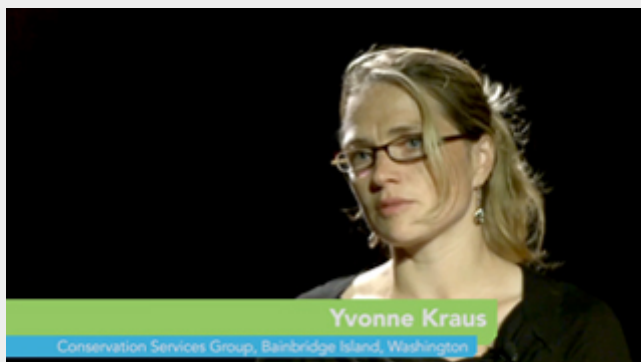
Programs that have developed strong and lasting partnerships have done so by identifying shared goals and seeking ways in which programs and partners can mutually benefit by advancing each other's missions. Even if partners don't have the same goals as your program, you can still try to find ways to work together that improve the success of both efforts. Several programs have established forums for regular communication with partners, such as a steering committee or stakeholder group that meets monthly or quarterly, to maintain collaboration and communication. Informal events—such as engaging with partners after hours in a social setting—have proven to be successful at building trust and camaraderie. One key lesson from programs that have established robust partnerships: remember that partnership development often takes more time than planned.

- The [Better Buildings Program San Jose](#) leveraged local, well-known organizations that delivered non-energy services to low-income residents to help the program reach interested homeowners. Most Holy Trinity Catholic Church and the local Boys and Girls Clubhouse offered the program space for events where they could meet with homeowners, teach them more about the program, and schedule home energy assessments. To help low-income residents cover the cost of home energy evaluations and upgrades, the program also created a partnership with Pacific Gas and Electric's Moderate Income Direct Install program (which offered free home energy assessments and weatherization services to income-qualified residents) to allow all program customers into the utility's program. To learn more about the Better Buildings Program in San Jose, see the case study [“San Jose, California, Partners with Established Community Groups to Win over Homeowners”](#).
- Early in its program, [EnergyWorks](#) in Philadelphia established a partnership with its local gas utility, Philadelphia Gas Works (PGW), to share lessons learned and customer information, including sharing energy use data once customers authorized its release. This partnership helped PGW enhance its own energy efficiency programs by applying the knowledge learned about home energy upgrades from EnergyWorks. The partnership also provided PGW customers with access to EnergyWorks' loan program. For EnergyWorks, the partnership gave it access to PGW customers for marketing. Learn more about the partnership from the case study [“In the City of Brotherly Love, Sharing Know-How Leads to Sustainability”](#). EnergyWorks found that by the end of their Better Buildings Neighborhood Program grant period, they had identified a successful formula of marketing, outreach, and contractor interface. They wanted their lessons learned to be useful in the future continued working with the city-owned utility, Philadelphia Gas Works (PGW) to develop a new [utility-run energy efficiency program](#). This program built off and mirrored the design of the EnergyWorks program by incentivizing comprehensive, whole-home residential energy efficiency projects. EnergyWorks' role changed to providing training and acting as a general contractor, which gave it more flexibility. PGW was able to provide bigger incentives than EnergyWorks could. In addition, PGW benefited from increased customer satisfaction by offering the program, so the program involvement and partnership was a win-win for everyone involved. For more information, see the U.S. Department of Energy's [Focus Series Interview with Philadelphia Energy Works](#).
- [Michigan Saves](#), formerly BetterBuildings for Michigan, established a partnership with Grand Valley State University (GVSU) to take the program's community-based approach to a new type of community—university staff—through a semester-long, employer-assisted initiative. The program found that the sustainability staff members at GVSU were interested in the program, and program staff described a “sustainability ethic ingrained in the school's culture.” GVSU employees were receptive to the energy efficiency message. University leadership joined in as well, with the provost's office and university president writing letters to staff in support of the program. The school's human resources department helped the program develop a database to manage services to employees. As a result of the program, 215 people working for GVSU (nearly 10% of total employees) signed up for the program. By going through the university, these sign-ups cost one-fourth to one-third of the program's normal marketing cost per person. Sixty percent of the homeowners who participated in the GVSU program undertook home upgrades, which was higher than Michigan Saves' average rate of 44%. To learn more about the effort, see the interview with program leads: [“It's Academic: BetterBuildings for Michigan Partners With University to Reach Employees”](#).

## Establish collaborative partnerships with contractors and communicate with them early and often

Contractors are more likely to serve as program champions when the program engages with them throughout program design, delivery, and improvement. Your contractors are the primary contact points with your customers, and the quality of their interactions and services strongly influences how customers view your program. Many Better Buildings Neighborhood Program partners found that gathering contractor input during the program's planning phase helped ensure that the program would create value for contractors as well as for customers. The programs built personal relationships with contractors by demonstrating interest in their business concerns and needs. Indeed, an [evaluation](#) of over 140 programs across the United States found that programs were more successful when they fostered relationships with their contractors and communicated frequently with them.

### [In Their Own Words: Engage with Contractors From Day One](#)



Source: [In Their Own Words: Engage with Contractors From Day One](#), U.S. Department of Energy, 2012.

By communicating regularly (e.g., via a monthly breakfast meeting, other outreach events) with a core group of contractors, programs were able to better monitor program implementation and receive suggestions for improvement. These programs elicited feedback from contractors about how customers perceived program offerings, as well as input about what was working and what was not for both contractors and customers. Some programs surveyed contractors to collect a regular stream of information about how program implementation was going and to get feedback before rolling out new offers or program design changes.

- [NeighborWorks of Western Vermont](#) maintained steady lines of communication with its network of contractors to help ensure that barriers to getting work done in a timely manner were identified early and that solutions were collaborative. The program held monthly one-on-one meetings with each contractor to review client status and progress and to identify any problems and potential training opportunities. The program also organized bimonthly group contractors meetings focused specifically on sharing new techniques or products. NeighborWorks used regular contractor communications, performance feedback, and contractor incentives and competitions to help contractors improve their assessment-to-upgrade conversion rates. By engaging contractors and including them from the start on any proposed program revisions or promotions, NeighborWorks was able to improve program delivery.
- [Enhabit](#), formerly Clean Energy Works Oregon, program is charged with saving energy and supporting clean economic growth. Much of its success has come from engaging contractors in a continual learning and improvement process. Enhabit solicits feedback from contractors at meetings every two weeks and uses this feedback to guide improvements. With support from the Energy Trust of Oregon, a few contractors collaborated to create the [Home Performance Contractors Guild of Oregon](#), which enables contractors to organize their opinions into a unified voice and have a more formal role in program and regional policy discussions. When Enhabit engaged a new financing partner, the program asked the Guild to examine the loan product and approval process. Input from the Guild helped ensure that the product was something that contractors would be able to explain and promote to customers.
- In Washington State, the [Repower Kitsap](#) program started in a region where the home improvement market was fragmented and under-developed. Contractors were initially wary of one another, tended to work only in their specialty, and often did not have working relationships with one another. The program established monthly brown bag meetings to discuss program goals and requirements and to gather contractor input on the program. The monthly meetings helped contractors get to know and trust one another and develop productive working relationships. Many contractors even shared leads with other contractors who specialized in the types of projects they could not or did not want to handle.



- The [Long Island Green Homes](#) program began consulting with contractors during program design and continued to do so as the program launched and began full service operations. The program established contact with a core group of contractors it trusted, meeting with them regularly to review program status and direction. In particular, the program made it a priority to engage with contractors when rolling out program changes, asking them about their needs, concerns, and current state of business. In this way, the program ensured that program offerings were adding value for the home performance industry and that program requirements were manageable for contractors. For more information on the Long Island Green Homes' launch and other pilot programs, visit the [October 2011 Better Buildings Residential Network Peer Exchange Call Summary](#).

## Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

### Case Studies

#### [In the City of Brotherly Love, Sharing Know-How Leads to Sustainability](#)

Author: U.S. Department of Energy

Publication Date: 2013

Philadelphia EnergyWorks helped sustain future programs by sharing marketing insights and program data with a local utility partner.

#### [It's Academic: BetterBuildings for Michigan Partners With University to Reach Employees](#) (132 KB)

Author: U.S. Department of Energy

Publication Date: 2013

This Focus Series interview discusses the semester-long, employer-assisted partnership between BetterBuildings for Michigan and Grand Valley State University (GVSU). This successful partnership involved an early adopter outreach campaign and served as a model for other program partnerships.

#### [Partnerships Can Benefit Energy Efficiency Programs and Utilities](#)

Author: U.S. Department of Energy

Publication Date: 2012

In this video interview segment, Yvonne Kraus of Conservation Services Group describes how program and utility partnerships can co-benefit each other.

#### [Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#) (555 KB)

Author: U.S. Department of Energy

Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

#### [Spotlight on Austin, Texas: Let Your Contractor Be Your Guide for Big Rewards](#) (445 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study discusses strategies that Austin Energy, a municipally owned utility, used to collaborate closely with building contractors to launch a new Best Offer Ever promotion quickly and effectively.

#### [Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions](#) (411 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study explains how Maine provided contractor sales training to boost upgrade conversions.

#### [Spotlight on Michigan: Sweeping the State for Ultimate Success](#) (500 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study describes an innovative program design used by BetterBuildings for Michigan to "sweep" neighborhoods in order to effectively reach its residential audience and achieve an 80% participation rate among those canvassed.

#### [Spotlight on Portland, Oregon: Making the Program Work for Contractors](#) (536 KB)

Author: U.S. Department of Energy

Publication Date: 2011

As a program charged with saving energy and supporting economic growth, Clean Energy Works Oregon (now Enhabit) balances contractors' work priorities with the program's need to enforce quality standards, track results, and ensure good customer service. This case study discusses Clean Energy Works Oregon's (now Enhabit's) strategies for actively engaging contractors to make the program successful.

### [Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins](#) (552 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Building on its understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) enlisted respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped drive demand for nearly 200 home upgrades in just six months

### [Spotlight on Seattle, Washington: Community Partnerships Work to Extend Program Reach](#) (5 MB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study shares how Seattle's Community Power Works engaged a vast network of partners to build on existing capacity and knowledge, extending the reach of its program in a short period of time.

### [Better Buildings Residential Network Case Study: Partnerships](#)

Author: U.S. Department of Energy

Publication Date: 2015

This case study interview shares how GTECH (Growth Through Energy and Community Health) Strategies, a Better Buildings Residential Network member, developed and maintains strong strategic partnerships with trusted local companies and organizations to meet a shared goal of completing 100 home energy upgrade projects.

## Program Presentations & Reports

### [RePower Program -- People Will Talk: Making Energy Efficiency a Neighborhood Issue](#)

Author: Helen Biersack, RePower

Publication Date: 2012

This presentation describes Washington's RePower program and lessons learned on community engagement as a driver of demand.

### [Better Buildings Program San Jose: Serving Moderate Income Residents](#)

Author: Adrianna Masuko, City of San Jose, California

Publication Date: 2012

Presentation describing San Jose Better Building program and tactics, including strategic partnerships, for reaching moderate income residents.

### [Shared Value in Utility and Efficiency Partnerships - Vermont Energy Investment Corporation](#)

Author: Nikki Kuhn, Vermont Energy Investment Corporation

Publication Date: 2012

Presentation that focuses on grantee program-utility partnership models.

### [Shared Value in Utility and Efficiency Partnerships - Local Energy Alliance Program](#)

Author: Cynthia Adams, Local Energy Alliance Program

Publication Date: 2012

Presentation that focuses on grantee program-utility partnership models from the programs perspective.

### [Shared Value in Utility and Efficiency Partnerships - Lessons in Perseverance, Flexibility and Mutual Respect](#)

Author: Kerry O'Neill, Connecticut Neighbor to Neighbor Energy Challenge

Publication Date: 2012

Connecticut's Neighbor to Neighbor Energy Challenge's perspective on their partnership with Northeast Utilities.

### [Working with Financial Partners - Clean Energy Works Oregon \(now Enhabit\)](#)

Author: Brian Alfano, Clean Energy Works Oregon (now Enhabit)

Publication Date: 2012

Presentation describing how Clean Energy Works Oregon (now Enhabit) works with financial partners.

## Program Materials

None available at this time.

## Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

### Templates & Forms

#### [Creating a Partnership Agreement Planning Worksheet](#)

Author: U.S. Department of Energy

Publication Date: 2011

One-page template to use when developing a partnership agreement between an energy efficiency upgrade program and another organization.

### Tools & Calculators

#### [Database for Incentives and Joint Marketing Exchange \(DIME\)](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2014

The Database for Incentives and Joint Marketing Exchange (DIME) is an online, searchable tool to help manufacturers and retailers identify incentive and marketing opportunities for promoting ENERGY STAR certified products, and to enable all partners to coordinate with the appropriate contact from other partner organizations on promotional opportunities.

## Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#) for materials from and about individual programs.

### Topical Presentations

None available at this time.

### Publications

#### [Engaging as Partners in Energy Efficiency: Multifamily Housing and Utilities](#)

Author: Anne McKibbin and Anne Evens, CNT Energy; Steven Nadel and Eric Mackres, American Council for an Energy-Efficient Economy

Publication Date: 2012

This report outlines where costs and energy savings can be achieved and dives into strategies that utilities and multi-family building owners can use to create a more effective partnership. With an understanding that states and local regions sometimes can lack energy efficiency policies, this report outlines ways to go beyond what's required and move the efficiency discussion forward in expanding the resources available for energy efficiency upgrades.

#### [The Role of Local Governments and Community Organizations as Energy Efficiency Implementation Partners: A Review of Trends and Case Studies](#)

Author: American Council for an Energy-Efficient Economy

Publication Date: 2012

This whitepaper showcases how local governments and organizations promote energy efficiency through policies and program partnerships. Presents eight case studies from communities across the country, including two Better Buildings Neighborhood Program partners (Clean Energy Works Oregon (now Enhabit) and Energy Impact Illinois).

#### [Partnering with Utilities and Other Ratepayer-Funded Energy Efficiency Program Administrators](#)

Author: U.S. Department of Energy

Publication Date: 2013

The objective of this document is to help state and local governments understand the role of program administrators (PAs) and assist them in developing successful partnerships with utility and other energy efficiency PAs. The majority of this paper presents information on partnering and leveraging current energy efficiency activities. However, it also includes information for governments in areas without active PAs, as well as an appendix with a case study describing how state and local governments can fill gaps and administer programs in the absence of a PA.

#### [Effective Practices for Implementing Local Climate and Energy Programs: Identifying and Working with Experts](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2015

This tip sheet was inspired by the experiences and expertise of EPA's Climate Showcase Communities (CSCs). It focuses on working with experts and highlights best practices and helpful resources and recommended resources for other communities interested in pursuing similar projects.

#### [Energy Efficiency Collaboratives: Driving Ratepayer-Funded Efficiency through Regulatory Policies Working Group](#)

Author: State and Local Energy Efficiency Action Network

Publication Date: 2015

Energy efficiency collaboratives vary greatly and are typically designed for a specific jurisdiction, making them hard to compare side by side. This guide seeks to highlight a few common elements and draw conclusions on the overall effectiveness of specific characteristics of collaboratives. This guide defines and examines four different types of collaboratives in terms of their origin, scope, decision-making method, membership, duration, available resources, and how they interact with and influence their respective commissions.

### Webcasts

## **Furthering Your Local Governments' Energy Efficiency Goals: Part 1 - Getting Support From Local Leaders**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Chuck Clinton, National Association of State Energy Officials; Jay Fisette, Arlington County, Virginia; Michael Yambrach, Washington, D.C.; Kaci Radcliffe, Skagit County, Washington; Jennifer Clymer, ICF International

Publication Date: 2011

This webcast shares useful and effective strategies for getting local leaders to support local government's energy efficiency goals.

## **Leveraging Partnerships with Faith-Based Organizations**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Rev. Fletcher Harper, GreenFaith; Paul C. Raver, Jr., Green Market Solutions; Alexis Chase, Georgia Interfaith Power & Light

Publication Date: 2011

This webcast explores how faith-based organizations and their partners have used energy efficiency as an organizing motivator to upgrade the institutional building and then members' homes.

## **Marketing & Outreach: Working with and Learning from Contractors**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Karen Villeneuve, New York State Energy Research and Development Authority; Peter Krajcs, AFC First Financial Corporation; Michael Rogers, GreenHomes America; Matt Golden, Recurve

Publication Date: 2010

This webcast highlights programs that actively engage the contractor community in program design and implementation. Several contractors share their views on best practices for Marketing & Outreach.

## **Workforce Development and Sales Training for Energy Efficiency Contractors**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Elizabeth Stuart, Lawrence Berkeley National Laboratory

Publication Date: 2011

This webcast reports on the energy efficiency services sector workforce size, expectations for growth, and training needs and features a case studies from Efficiency Vermont and Efficiency Maine.

## **A Guide to Using AmeriCorps National Civilian Community Corps Teams to Execute Your Mission**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Corporation for National and Community Service

Publication Date: 2011

This webcast describes how energy efficiency programs can use AmeriCorps National Civilian Community Corps Teams to help their missions.

## **Collaboration and Consensus Building in States to Support Energy Efficiency as a Resource**

### **[Presentation](#), [Media](#), [Transcript](#)**

Author: Wally Nixon and Eddy Moore, Arkansas Public Service Commission

Publication Date: 2011

This webinar presented the story of the successful stakeholder process in Arkansas which led to the state's 2007 "Quick Start" utility-administered energy efficiency programs, the expansion of Quick Start programs to comprehensive programs in 2009, and the adoption in 2010 of increasing annual energy efficiency goals for 2011-2013. General principles of a successful collaborative process by utilities, utility regulators, customers and customer groups, state agencies, energy efficiency and consumer advocates, and others was discussed.

## **How to Design a Community Energy Alliance**

### **[Presentation](#), [Media](#) (75 MB), [Transcript](#)**

Author: Ben Taube and Jolyn Newton, Southeast Energy Efficiency Alliance; Eric Mackres, American Council for an Energy-Efficient Economy

Publication Date: 2010

Webcast on how to design a community energy alliance.

## **Partnering with Utilities Part 1 -- Successful Partnerships and Lessons from the Field**

### **[Presentation](#), [Media](#) (68 MB), [Transcript](#)**

Author: Jennifer Clymer, ICF International; Philip LaMay, Allegheny County, Pennsylvania; Christian Williss, Denver, Colorado; Sharon Procopio, Denver, Colorado

Publication Date: 2011

This webcast served as a roundtable for communities to describe successful partnerships between local governments and utilities that enabled the local governments to implement new clean energy programs or enhance existing ones.



**Partnering with Utilities Part 2-Topics for Local Governments-Creating Successful Partnerships with Utilities to Deliver Energy Efficiency Programs**

[Presentation](#), [Media](#) (65 MB), [Transcript](#)

Author: Jennifer Clymer, ICF International; Neal De Snoo, Berkeley, California; Dan Schoenholz, Fremont, California; Catherine Squire and Gina Blus, Pacific Gas and Electric Company; Jon Ippel, Orlando, Florida; Cameron Saulsby, Orlando Utilities Commission

Publication Date: 2011

This webcast focused on advanced topics for local government-utility partnerships, with presentations from local governments and their partnering utilities that have well-developed, multi-year relationships and programs.

